

Deliverable Submittal Procedures and Guidelines

CalWIN



RECORD OF CHANGES

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CalWIN Project

Deliverable Submittal Procedures and Guidelines

Introduction

The purpose of this document is to provide guidance as to the manner in which deliverables should be submitted to the Program Management Office (PMO).

At this time the procedure does not address the delivery of CalWIN application software.

Audience

- EDS CalWIN Team/Technical Leaders
- EDS CalWIN Management Team

Deliverable Submittal Procedure Steps and Guidelines

Step	Action
1	Coordinate Administrative Details
2	Ensure Compliance with Project Standards
3	Prepare Electronic Files
4	Print Paper Copy

Step 1 - Coordinate Administrative Details

Note: This step should be completed approximately two weeks prior to the scheduled submittal date. Does not apply to Deliverable Expectation Documents.

- ☐ Work with the PMO to complete the Deliverable Administrative Details Form.

Step 2 - Ensure Compliance with Project Standards

- ☐ Ensure that the deliverable conforms to CalWIN project standards. For deliverables created in MS-Word, see the Style Sheet and Templates Procedures for details.

Step 3 – Prepare Electronic Files

- ☐ Prepare electronic files according to the guidelines and naming conventions below.
- ☐ Create a folder under the Data\Calwin\Deliverables to be Submitted folder using the naming conventions below.
- ☐ Place electronic files in the folder created above, creating additional folders as necessary for the logical organization of the deliverable.

Guidelines

- Deliverables created in MS Office or MS Project tools should be delivered in their native form except where noted below.
- Deliverables created in tools other than MS Office or MS Project tools must be delivered in both their native form and in a .pdf or HTML file format.
- Deliverables created using multiple medium types (i.e. cover page in MS Word and contents in ErWIN) and multiple files (even if of the same medium type) should be merged into one .pdf file for ease of printing and accessibility on CalWIN Website.
- For extremely large deliverables, multiple .pdf files should be created based on logical break points in the deliverable (i.e. volumes).
- A “snapshot” of Modelmart should be taken at the time of the submission of deliverables developed and maintained in this tool.

File and Folder Naming Conventions

Deliverable files and folders should include the following elements in the order noted, except for folder created for the logical organization of the deliverable:

1. ITP Number
2. Name of Deliverable or Sub-Deliverable as per ITP or DED
3. Version (files only)

Note: File and folders should not contain more than (50) fifty characters, so abbreviations may be necessary.

Example:

Folder:	2.1 Validate Functional and Technical Requirements (abbreviated)
Sub-Folder:	Volume 4 (for logical organization of deliverable)
File:	2.1.5 Technology and Environment Req Rpt v1.0 (abbreviated)

Step 4 – Print Paper Copy

- ☐ Print copy of the entire deliverable.
- ☐ Insert tabs into master copy where appropriate (if applicable). Note: Based on your input to the Deliverable Administrative Details Template (see Step 1), the PMO will coordinate production of tabs.
- ☐ Hand-deliver printed deliverable to the PMO Manager.
- ☐ Provide official correspondence with the printed deliverable. Include the file server location if the files are being delivered in a form other than their native format.

Guidelines

- Print one-sided copy for ease of assembly and photocopying.
- Only one copy is required unless the deliverable is submitted later than the scheduled date for submission to the PMO. For late submittals the PMO Manager may, at her option, request that additional copies of the deliverable be provided.